

11TH ANNUAL SIOP LEADING EDGE CONSORTIUM

BUILDING A **HIGH-PERFORMANCE** ORGANIZATION:

A FRESH LOOK AT PERFORMANCE MANAGEMENT

October 2–3, 2015 | Renaissance Boston Waterfront



Presented by



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2015 Leading Edge Consortium Planning Committee

Elaine Pulakos, Chair
Mariangela Battista
Allan Church

Erica Desrosiers
Gene Johnson
Cheryl Paullin

SIOP would like to thank our 2015 Leading Edge Consortium Partners

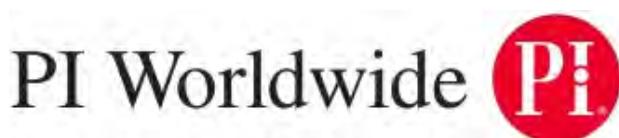
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From the Consortium Chair



Welcome to Boston and the 11th Annual SIOP Leading Edge Consortium. This event promises to continue the consortium's fine tradition of high-quality and innovative programming in an environment especially suited for interaction.

This year we are pleased to present expert advice from top business leaders and scholars on performance management. I want to thank them for sharing their time and expertise with us. I would also like to thank you, the attendees, for sharing this experience.

A special thank you goes to the organizing committee: Mariangela Battista, Allan Church, Erica Desrosiers, Gene Johnson, and Cheryl Paullin. Their help in planning this event was invaluable. Finally, I would like to thank our sponsors for making this wonderful event a reality. I hope you will find this LEC to be entertaining and stimulating, as well as educational.

A handwritten signature in black ink, appearing to read "Elaine D. Pulakos".

Elaine D. Pulakos
Leading Edge Consortium Chair

WiFi courtesy of  **quintelagroup**
simplify your assessment process

To access the consortium WiFi, find the network labeled
Renaissance_CONFERENCE

Your login is **Quintela** (case sensitive)



THURSDAY, OCTOBER 1

4:00-8:30 pm **Registration** - Third Floor Prefunction

7:30-9:00 pm **Welcome Reception** - Atlantic Ballroom 1-2, presented by



FRIDAY, OCTOBER 2

7:00-9:00 am **Registration** - Third Floor Prefunction

7:30-8:30 am **Continental Breakfast** - Third Floor Prefunction

8:30-9:00 am
Pacific Salons A-D Opening Session: ***Putting Performance Back Into Performance Management***
Session Leader: Elaine Pulakos, PDRI, a CEB Company

For over 50 years, we've repeatedly attempted to address dissatisfaction and disappointing performance management (PM) results by tweaking our formal PM systems. These attempts to fix PM have led to cycles of reinventing PM only to achieve disappointing results and then reinventing it again and again. Over time, PM systems have become increasingly bureaucratic, perhaps due to the assumption that steps and paperwork would drive the performance outcomes we're seeking. Formal PM steps and process have not only failed to yield high quality PM outcomes, but they have created dissatisfaction with PM systems, indicating that further formal PM system fixes are not the answer. The opening session of the conference will present data that show the state of PM today and identify evidence-based priority areas in which to target PM reform.

9:00-11:30 am
Pacific Salons A-D **Overview of Morning Sessions**
Aligning Performance Management Strategy to Business Strategy
Session Leader: Allan Church, PepsiCo

Managing performance to drive business outcomes is a key imperative in today's work environment. Unfortunately, our formal performance management systems are failing to deliver, leading many organization to undertake PM reform efforts. Before deciding how to reform the PM system, however, it is important to step back and establish "the why" or compelling reason to invest in change. To be of high value, the PM strategy needs to enable the organization's priorities (e.g., customer focus, collaboration) and contribute to solving business challenges (e.g., lack of agility, deficiency in global competitiveness, inconsistent innovation). This requires approaching PM reform holistically, based on a business case that is tied to the organization's strategy and needs. This session will build the case for raising our thinking about PM up, beyond formal system design in a vacuum to a process that can be instrumental in driving business strategy. Case studies from Cargill and Eli Lilly will demonstrate how two organizations accomplished this.

9:00-10:00 am
Pacific Salons A-D ***Keynote Address – Trouble With the Curve***
John Boudreau, USC Marshall School of Business



Connecting performance management to strategy requires more than insuring that goals and competencies are consistent with that strategy. It requires deep understanding and clear communication about "pivotalness" or the return on improved performance. This is the relationship between improved performance and strategic value. All performance improvements are not equally pivotal, and most organizations fail to distinguish them. That causes workers to strive very hard on less pivotal performance elements and not hard enough on the pivotal

elements. Performance management processes often miss these nuances. They include multiple performance elements: “key performance indicators” or “competencies” for each job. Managers say, “Do a great job,” and the worker thinks that means they must make the paperwork perfect and get it in early, go on the maximum sales visits, and deeply know every clients’ special problems. Yet, the best return may be achieved by letting the paperwork be a bit less perfect, direct the client problems to the technical team, and instead maximize the sales visits. If someone masters their sales visits, you encourage them to go for the “wow” factor of deep customer knowledge but not until they’ve got the basic elements up to standard. This session will showcase mathematical curves that plot the relationship between performance and strategic value, how they relate to the distribution of talent in your workforce or applicant pool, and how to use them to better optimize performance management.

10:00-10:30 am

Break - Third Floor Prefunction, presented by **PI Worldwide** 

10:30-11:30 am

Pacific Salons A-D

Performance Management Strategy Case Studies

Case Study 1: Alan Colquitt, Eli Lilly

Case Study 2: Sharon Arad, Cargill

11:30 am-12:00 noon

Pacific Salons A-D

Benchmarking Performance Management Today

Session Leader: Gene Johnson, Working Matters, LTD.

This session will present data on perceived PM effectiveness, pain points organizations are facing, and what changes are being made to PM systems today. In addition to presenting data that will be collected prior to the conference, the audience will participate in polling on a subset of the benchmarking questions and discussion of the key PM pain points they are facing in their organizations.

12:00-1:00 pm

Lunch - Pacific Salons E-H

Presentation of Human Resource Management Impact Award



1:00-3:05 pm

Pacific Salons A-D

Benchmarking Performance Management Today

Session Leader: Erica Desrosiers, Walmart

A great deal of staff time (and hence cost) is devoted to PM activities; significant financial resources are also expended on automated PM systems. Organizations invest billions of dollars in activities that employees, managers, and HR heads often see as burdensome and low value. Thus, many organizations are examining the most burdensome and low-value PM activities to determine if they can be reduced in complexity or eliminated. This session will present case studies that show different approaches to streamlining the formal PM system and how each organization made the right choices about what PM system components they needed to address their organization’s specific goals, culture, and needs.

Case studies will each be 25 minutes max

Case Study 1: Michelle Donovan, Google

Case Study 2: Don Moretti, Sears Holdings Corporation

Case Study 3: Alan Kamin, GE

Case Study 4: Amy Grubb, FBI

Case Study 5: Jeffrey W. Orlando, Deloitte

3:05-3:30 pm

Break - Third Floor Prefunction, presented by **PI Worldwide** 

3:30-4:00 pm

Pacific Salons A-D

Legal Concerns in Removing Formal Performance Management Components

Session Leader: Eric Dunleavy, DCI Consulting

Often, PM systems supply the data on which operational talent management decisions are based, such as compensation, promotions, or force reductions. When operational decisions become a target of litigation, the

underlying PM system may also be implicated. This session will address the potential implications of removing formal PM components, such as performance ratings, on the legal defensibility of talent management practices.

4:00-5:00 pm
Pacific Salons A-D

Designing Your Organization's Performance Management Reform
Session Leader: Cheryl Paullin, HumRRO

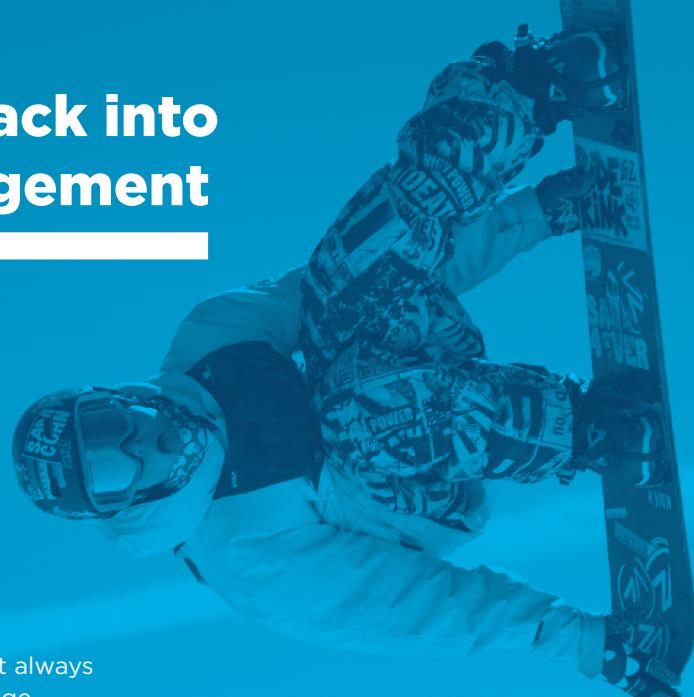
This session will summarize information from the day's session to identify key factors organizations should consider (a) when determining if the organization needs and is ready for PM reform and (b) which elements of PM reform are viable and make sense in light of the organization's context.

6:30-9:30 pm

Optional Networking Event at Salvatore's, presented by  CULTUREFACTORS[®]

Salvatore's, an upscale restaurant and bar on the waterfront, is located in the heart of the booming seaport district and a short walk from the Renaissance Boston Waterfront. Please meet in the lobby at 6:15 for this event. Preregistration is required. Thanks to the generosity of our sponsor, we are able to offer this unique evening of fun, food and entertainment for only \$50.

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SATURDAY, OCTOBER 3

7:30-8:30 am Registration/Help Desk - Third Floor Prefunction

7:30-8:30 am Continental Breakfast - Third Floor Prefunction

8:30 am-12:00 noon Overview of Morning Sessions

Pacific Salons A-D **Behavior Change**

Session Leader: Mariangela Battista, XL Group

Employee performance and engagement are substantially higher in the presence of three critical PM behaviors: managers setting clear expectations, providing informal feedback, and helping employees develop and succeed. These are, in fact, the same behaviors we attempt to drive with our formal PM systems, but the systems are not producing these. Driving complex behavior change is a critical aspect of effective performance management reform, but it is also the most difficult. It requires managers and employees to form very deep associations that hardwire new PM behaviors, so these become habitual. To achieve this outcome, it is necessary to go beyond discrete training events that sit outside of work tasks and instead leverage the work itself for learning, with its embedded, strong learning drivers. This session will discuss research and practical techniques for driving behavior change in the workplace as well as present case studies showing how three organizations have applied different approaches to achieve behavior change.

8:40 -9:30 am **Keynote Address - Reinvent Performance Management Through Neuroscience**
Pacific Salons A-D David Rock, NeuroLeadership Institute



Performance management continues to be one of the most challenging activities, with many companies losing a whole quarter of productivity at review time. The emphasis continues to be on technology and measurement solutions, instead of tackling the challenge where it is hardest: changing the mindset and the quality of conversations.

Join David Rock, Director of the NeuroLeadership Institute, for an interactive experience to help you significantly improve the effectiveness of your performance programs, or even develop a whole new strategy for managing performance.

The session draws on new research from neuroscience outlining why any kind of feedback process is so challenging, and how to do it better. We will cover issues including:

- How to “brand” performance management in your organization
- How to develop the right mindset within managers and their employees about performance
- New insights for how to shift the quality of conversations
- How to go from an annual to an “all the time” feedback model
- Understanding the various types of feedback interventions
- What and how to best measure to maximize new habits in managers

9:30-9:55 am Behavior Change Case Study 1: Rob Ollander-Krane, Gap Inc.
Pacific Salons A-D

9:55-10:25 am Break, Third Floor Prefunction presented by **PI Worldwide** 

10:25-11:10 am
Pacific Salons A-D

Embedding Large Scale Behavior Change and Alignment to Drive Effective Performance Management

Session Leader: Elaine Pulakos, PDRI, a CEB Company

This talk will discuss an evidence-based holistic approach to large-scale complex behavior change that includes three major components: motivating change, embedding new behavior in an organization's culture through teambuilding and in-job performance supports, and reinforcing change until new behavior is habituated.

11:10-11:35 am
Pacific Salons A-D

Behavior Change Case Study 2

Adam Massman, Rockwell Collins

11:35 AM–12:00 noon
Pacific Salons A-D

Behavior Change Case Study 3: No Labels:

Driving an Ownership Culture With Performance

Kim Stepanski, Pfizer - Management

12:00-12:45 pm

Lunch - Salons Pacific E-H, presented by  denison™

12:30-2:00 pm
Pacific Salons E-H

Keynote Address - Rearranging Deck Chairs or Charting a New Course? Driving Organizational Change Through Performance Management

Allan Church, PepsiCo



Although having an effective goal-setting process, the right rating scale(s) and definitions in place, managers who have the capability to have quality feedback conversations with their employees, and a meaningful link between performance distributions and actual rewards paid out to people are important considerations in a performance management systems, some might argue that's just the tip of the iceberg. The key question we might ask here is "performance for what?" or "performance to what end?" Is an organization's PM system solely about eking out profits or is there a consideration of the broader strategy, emotional and cultural components being communicated and reinforced? Do leaders even know what exactly they are communicating anymore about what's truly important? Although many organizations don't realize it, PM processes are one of the most powerful mechanisms for driving large scale organizational change. Unfortunately, HR professionals and even I-O psychologists often don't help their clients remember the power of these tools either, particularly when we get lost in the weeds of design, ratings versus no-ratings debates, and need to fit a performance curve to a limited merit increase. This closing session to the Leading Edge Consortium will cast the net wider by discussing the strategic role of performance management from an OD and systems perspective with a focus on where I-O can shift the mindset of their clients away from the micro to the macro.

Thank you for attending the 2015 LEC.

**Join us next year in Atlanta, GA on
October 21-22, 2016.**



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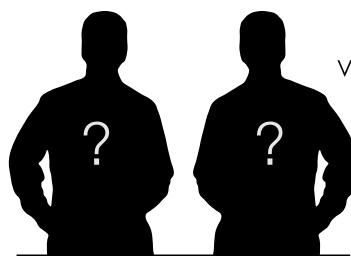
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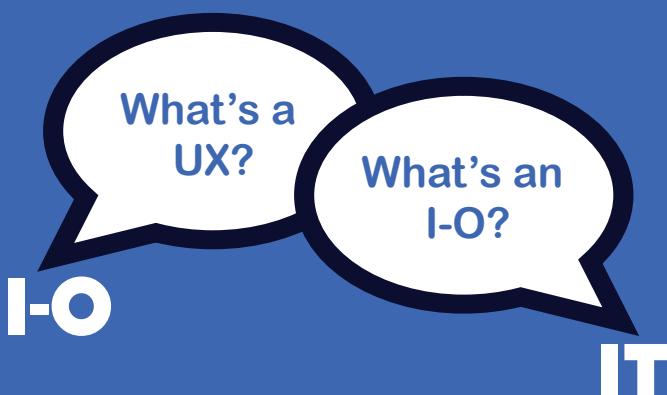


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These will be emailed to all attendees after the event.



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